

Developing an Outcome Measurement System for a Merged Program

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Executive Summary

Legal Aid Services of Oklahoma, Inc. (LASO) is the newly formed statewide program that resulted from the merger of the two basic field programs in the state in 2002. As the merger was in quick response to LSC's decision to fund only one basic field service area in the state and had not been the configuration endorsed by the state planning process, very little planning and preparation had been done in order to smoothly mesh two programs that had been operating on their own for 25 years.

Against this backdrop, LASO applied for and was accepted as a recipient of a planning grant from the Tulsa Area United Way to underwrite a year-long project to develop a system for measuring outcomes. During 2003, LASO worked with a consultant and a staff team over the course of 15 sessions to create a system that measured the changes that clients experience as a result of the services that the program provides. Because the project followed the model endorsed by the United Way of America, LASO created a logic model that projected the outcomes that it was hoped that clients would experience based upon the priorities and goals of the program, and then set about creating a system to measure them. Questionnaires that focused on soliciting client responses through telephone surveys were developed and testing using staff and volunteers began toward the end of the year. Different inquiries were fashioned to capture information on the extent to which clients experienced initial, intermediate, and long-term outcomes. The questionnaires also varied depending on whether clients had received legal services in the nature of Tools (such as advice, information, or self-help materials that the client can use to go forward on his or her own), Transactions (such as non-adversarial drafting or document preparation that solves the client's problem) or Representation (advocacy with an opposing party or before a court or agency). Sampling size was determined using statistical theory and implementation of the system will begin this year using volunteers and staff as available on randomly selected closed cases in all of the program's 14 offices statewide.

LASO believes that its outcome measurement system has given it a means of gaining important feedback on all of its services, and not just litigation and advocacy as had been its focus before. The extent to which our clients experience positive changes because of our work will provide valuable information for our program, our funders, and others in the justice community. Most importantly, undertaking the development of this outcome measurement project has helped the newly merged organization to grow stronger as a statewide entity. Creating a new project that was uniquely that of the new organization provided a vehicle for staff from both sides of the state to come together and help the merger along.

Developing an Outcome Measurement System for a Merged Program

Beginning at the start of 2003, Legal Aid Services of Oklahoma, Inc. (LASO) began a year-long process of developing an outcome measurement system for the work that we do. Having just finished our first year as a newly merged statewide program, undertaking the creation of this system was one of a myriad of new projects that were going on simultaneously. Some thought that there could not have been a worse time to try to introduce such a mammoth twelve-month process; hindsight may show that there could not have been a better one.

From Whence We Came

As the topic I have been assigned is to deal with creating an outcome measurement system in a newly merged program, it might make some sense to explain the context in which we were operating. Our history as a state as well as that of our legal services programs had not prepared us for the decision to require merger. Historically, Oklahoma had been two territories prior to statehood, and sociologically, demographically, and geographically one can still see the division between east and west within the state. The eastern part of the state had been Indian Territory and home to the “Five Civilized Tribes” among others, and even today that part of the state has the highest concentration of Native Americans to the general population of anywhere in the United States. The western part of the state was called Oklahoma Territory and, although some “Plains” Indian tribes were settled there, the west was opened to non-Indian settlement early on through land runs and land grabs by “Boomers” and “Sooners”. Indeed, even the Federal Government treated the two sides of the state differently; down to today, the laws, rules, and procedures concerning Indian land titles are much different in the east than in the western part of the state. After statehood in 1907, two major cities of similar size evolved (Oklahoma City in the west and Tulsa in the east) and each has remained a jealous competitor of the other ever since.

Starting in World War II, legal aid societies developed in the two urban areas due to the volunteer efforts of Oklahoma lawyers working with the needs of service men and their families. These societies evolved into Legal Aid of Western Oklahoma, Inc. (LAWO) and Legal Services of Eastern Oklahoma, Inc. (LSEO) when the urban societies joined with rural OEO legal services offices after the advent of LSC funding in the 1970s. A separate Native American program, Oklahoma Indian Legal Services, Inc. (OILS) spun off in the early 1980s with one office in Oklahoma City to work on special Native American issues statewide. LAWO, LSEO, and OILS grew and held on during the 1980s and 1990s, with each of the basic field programs having both a large geographic service area and over three hundred thousand potentially eligible low-income people to serve. Although the programs cooperated on PAI projects, matters before the state legislature, substantive task forces and training, there was no sense among them that there was any better configuration than as had evolved.

Our Efforts at State Planning

With the advent of state planning directives in the late 1990s, the Oklahoma programs began their discussion about how to better work together and where to find common ground in the name of better services to clients. As a part of this process, the programs hired a consultant and formed task forces and working groups made up of program staff, board members, client members, and other stakeholders around the state. The committee considering the configuration question nearly unanimously agreed that having two large basic field programs situated in the eastern and western parts of the state, and headquartered in the state's two urban areas, was a viable delivery system and that there were no substantial savings or other good reasons to reconfigure into a statewide program. A number of the other working groups came up with detailed plans about how the separate programs could work better together. For instance, the Private Attorney Involvement Working Group came up with a multi-year plan focusing on joint recruitment efforts, including collaborative approaches to working with the Oklahoma Bar Association and judiciary on furthering pro bono recruitment and utilization throughout the state. By the same token, the Training Task Force worked up a plan to create a multi-year training calendar, have a permanent task force committed to developing training modules and individual training plans for staff members, develop statewide survey instruments to identify common training needs, and establish a permanent inter-program Training Committee.

On the other hand, the work of some task forces brought to the surface the fact that bringing together the views of different programs would not always create uniform, harmonious answers that would be jointly followed. We learned that we all did not share the same organizational values. For instance, from the Intake, Advice, and Information Task Force there were fundamental differences that were not resolved: staff representatives from one program wished to continue development of a centralized telephone intake and brief services system for use by all the programs, while staff from the other basic field program wished for each of its offices to continue doing intake locally as they had done historically. On the task force committed to Community Education and Pro Se Assistance, staff from one program wanted to expand the informational and self-help services that had been begun through funding from local corporations and a NAPIL Fellowship, while staff from the other program took the contrary position that sufficient educational materials were already generally available through the state bar association, and that helping low-income clients with self-help materials would only alienate our supporters in the private bar. Similarly, the working group on Resource Development agreed upon a number of funding opportunities such as grants, foundations, and legislative appropriations that the programs should pursue in a collaborative fashion, but could not get buy-in from one program on a statewide lawyers' fund drive or to jointly pursue funding for a statewide Senior Hotline from the Administration on Aging (because of a fear that this would hurt local Title III funding for one of its offices).

The Oklahoma State Plan was submitted in March 2001, but was never responded to by LSC. Later that year, the Corporation announced that it would only be funding one statewide service area in Oklahoma for basic field services starting in 2002, but otherwise gave the programs no feedback concerning any of the plans, collaborations, or even the differences in values that had come to the surface during the state planning process. The Boards of LAWO and LSEO voted to merge and become Legal Aid Services of Oklahoma, Inc. (LASO) in the fall of that year, and the new statewide entity began functioning January 1, 2002 with a new Executive Director who had not previously worked in a legal services program.

Merge We Must

Although new leadership brought with it a fresh look at the needs of the program and no history with the state planning process, LASO was at its core an involuntarily merged program with little direction as to the preferred paths to take concerning all of our differences. Because of the way in which the merger happened, there had been very little planning for suddenly functioning as one statewide program. Numerous differences faced us. A collective bargaining agreement and a wall-to-wall union covered the staff on one side of the state, while those in the other part of the state had never been unionized. For one part of the program, salaries would have to get better, while they would stay frozen in the other part. On one side of the state, employee benefits would improve, while they would have to get worse on the other side.

Technologically we were also a house divided. Although both of the predecessor programs had gone to Kemps' case management system in the years preceding the merger, different versions, codes and customizations were in place. One side of the state used Word and the other used Word Perfect; one used Outlook and the other used Netscape. Different offices could not share certain documents or imaged faxes because of the lack of compatible software.

Even more fundamental differences concerning the heart of the program's legal work could be found in this "shotgun" corporate marriage. In one half of the state, each individual local office had its own separate priority statement and case acceptance policy couched in terms of case types (e.g. we do "visitation" and "custody" cases; we do not do "bankruptcies"). The other half of the state had had a system-wide prioritization and case acceptance policy based upon what was at stake for the client (e.g. we do cases and matters that will "prevent or alleviate harm", "preserve shelter or end homelessness", etc.).

As LASO entered its first years as a newly merged program, much still needed to be done. As one might expect with a bunch of lawyers, everyone thought that their old way of doing things was the best. For convenience, local offices still largely used their old forms. A comprehensive policy and procedures manual remains in draft form while we solicit and receive more input from around the state.

Keeping Peace with the United Way

One of our largest and most successful United Ways, the Tulsa Area United Way (TAUW), had for several years been urging us to undertake an outcome measurement program that it sponsors for some of its selected agencies. Because of the uncertainties initially over state planning, the projection that LSC would be promulgating its own outcome measurement system for us to implement, and then the difficulties of the merger, we had not previously applied to be accepted for the TAUW program. In our annual TAUW funding applications, we reminded them that we already used client satisfaction surveys at the conclusion of representation and that our advocates captured in our case management system what they believed to be the “main benefits” that we had conferred at the time that cases were closed. Although TAUW had continued to support and fund us each year, they were never satisfied with our excuses. In 2002, with the vagaries of state planning behind us and the merger (on paper) complete, our new Executive Director finally said yes. At the end of that year, LASO was selected as one of ten TAUW agencies to be funded for a year-long outcome measurement development project starting the following year.

The Process: Are We Sure We Want To Do This?

By January 2003, our new Executive Director had worked and re-worked the new management structure and our merged program was ready to begin the real process of becoming one organization. As the Director of Litigation and Field Services, I was put in charge of setting up a task force to work on standardizing our intake and case handling procedures, as well as another one to create a cohesive PAI system throughout our 14 offices. At the same time, we began the process of setting up our Outcome Measurement Working Group. Our grant from TAUW would provide us 110 hours of time from an experienced consultant, whose function would be to guide us over the course of a year in creating a system to measure the impact of our work from the standpoint of those we serve. Our Executive Director requested that the LASO team be large and diverse; in addition to myself, our team initially consisted of both of our Marketing and Development people, both the Director and Deputy Director of the Personnel Division, the Managing Attorneys of our largest urban offices and our Hotline, our two technology gurus, our Community Education and Pro Se Coordinator, and even one support staff member. Over the course of 2003, this group came together from all over the state for 15 meetings, primarily day-long face-to-face sessions, but also by teleconference and Webex. During the year, many of those who had been appointed dropped off, and a core group of only about six people has continued. We started from scratch, made constant revisions, went completely back to the drawing board several times, tested and re-tested our processes and our results, and then went back to the drawing board again. By the end of 2003, our basic outcome measurement system was in place, even though it remains dynamic; it is a certainty that it will continue to evolve as we move to the next level throughout 2004.

The LASO Outcome Measurement Model

As we had tried to convince the United Way, LASO already had available a number of different means to describe the results of our work. Like other legal services programs, we routinely used the LSC Closing Codes and were looking at the emerging National Index Codes to better categorize our work. As noted earlier, the previous program in the eastern part of the state had used client satisfaction surveys for many years and had also established a coding system for the assigned advocate to utilize to capture the extent to which the client's goals had been achieved. Both of the previous basic field programs had the “main benefits” codes in our case management systems for advocates to select from in order to indicate what they believed had been accomplished for their clients. However, the reason that TAUW was not moved by our previous systems is because outcome measurement as defined by the United Way of America is not just satisfaction or our take on what we did or how good we think we were as the service providers. Instead, United Way defines outcome measurement as “the regular systematic tracking of the extent to which program participants experience the benefits or changes intended during or after their involvement with the program”. Under this approach, examples of measurable outcomes are changes in such things as knowledge, skills, attitude, circumstances, behavior, or status as a result of a program’s efforts and activities. For us as a legal aid program, this meant starting fresh and realizing that while it was still important for us to capture what we believed to be the “main benefits” that we had bestowed, outcome measurement in the United Way sense was about changes from the client’s viewpoint. Because of this shift in focus, the outcome measurement model that our newly merged program ultimately crafted was different from anything either of our basic field programs had ever done on their own before.

The key to creating an outcome measurement system from the United Way viewpoint is the creation of a logic model: an “if – then” flow chart of relationships between what the program does and the results that you expect to see. The most recent LASO logic model is an attachment to this paper. Our working group began by examining our Inputs (funds, staff, volunteers, etc.), the Activities that we conduct with those inputs (advice and counseling, brief services, self-help materials, representation, etc.) and the Outputs that result (number of advice services provided, number of full representation services provided, etc.) In the development process, the logic model then moves to look at what Outcomes should be expected from those inputs, activities, and outputs of the organization. It was at this point in our process that some critical choices had to be made.

The overriding question that had to be resolved was whether we measure cases (some or all) or whether we measure impact. As mentioned above, the two programs prior to merger had distinctly different priority statements, one couched in types of cases handled and the other couched in types of issues. At this juncture, we were very fortunate for our new Executive Director to have made the decision that the merged program would adopt the Priority Statement that was based upon what was at stake for the client and the impact that we hoped to achieve. Once that we were able to say that our long term purpose for clients was to help them achieve access to the justice system, preservation of their civil liberties, equal protection, and the intended benefit of laws, and to preserve and protect for them basic needs such as food, shelter, income, health, and

personal safety, we were able to easily see what we hoped our long-term outcomes should be. I believe that this would have been nearly impossible had the program maintained priorities based on case types that varied from local office to office.

Having the guideposts, the next questions that we had to answer had to do with whose outcomes we wanted to measure. Initially, our Executive Director had wanted us to focus on family law cases, but it quickly became obvious that the impacts that we were trying to measure were not case specific. We also had to decide whether we wanted to limit our measurement efforts only to one or more types of legal assistance. Historically our programs had previously tended to utilize our case reviews and satisfaction surveys to focus on advocacy that merited a cardboard file. Clearly, full representation advocacy is our most visible work and offers the opportunity for making the biggest differences in the lives of our clients and in our society. Yet in the post-Gingrich days when we have recommitted to expanding access, limiting our inquiry to representation cases means that we are choosing to ignore the impact of fully 85% of our work. By the same token, telling our advocates that we will be measuring outcomes only in representation cases may send the wrong message, causing our advocates to shy away from the hard challenges and to accept only those easier ones that will most likely result in the best outcomes. We decided that to avoid encouraging “creaming” and to seek the broadest picture of the impact of our work, we would measure outcomes from all the different levels of assistance that we provide.

Having made the decision to not limit our inquiry to certain types of cases, the system that we developed had to be both flexible and broad-based. According to the United Way model, outcomes to be measured include those that are initial, intermediate, and long-term, and for our logic model these concepts neatly fit our need to have a system that ran the gamut of both all the different problems that our clients present and all the different levels at which we serve them. However, we also knew that we faced real challenges in trying to measure all of these kinds of results with all segments of our client base, especially those of the 20,000 people each year that we encounter in only a fleeting way. We were still committed to sampling outcomes from all of the different levels of service that we provide, but pragmatically we had to devise ways to measure different outcomes based on the depth of assistance we had been able to give.

Looking at the degree of assistance in the legal services context meant that we had to look at the level at which the case had been handled, and for us this meant that we began with the familiar, the LSC closing codes. Our working group spent many weeks trying to equate the various closing codes with the degree to which we could expect to measure initial, intermediate, and long term outcomes. Some of these were good fits. For instance, cases closed with codes “F”, “G”, “H” or “I” could be presumed to have been the result of representation and advocacy and could probably be tested for all outcomes. At the other end, cases that were closed as “A’s” usually were the result of limited advice and counseling, suitable for only measurement of initial outcomes. However, other closing codes were less helpful. For instance, cases closed with a “B” could range from sending a letter to a landlord to a complete legal service such as drafting a will. Even worse, cases closed with a “C”, “D”, “E”, or a “J” do not give you

any information as to the degree of assistance that our offices supplied prior to the cessation of services, and hence no help in disclosing what outcomes could expect to be measurable. After struggling with trying to use the traditional LSC closing codes as determiners of which outcomes to measure, we finally decided that we needed some other way to categorize our work for the purpose of our new system.

Rather than to try to use the LSC closing codes or any other existing coding system, our team decided that we probably could categorize all of our work into four basic categories:

TOOLS

Giving a client advice, information, self-help (*pro se*) materials or forms that the client needs to understand possible options and/or to address the legal problems on his/her own.

TRANSACTIONS

Serving a client with non-advocacy legal work that resolves the client's problem with the drafting of documents, such as wills, deeds, contracts, DPOA, incorporation, application for tax benefits, advanced medical directives/DNR.

REPRESENTATION

Advocacy on behalf of a client with or without litigation, such as negotiation with a landlord, appearing in court or administrative hearing.

NOT A CASE

Matters, such as community education and referrals without legal advice.

Over the course of our sessions, we determined that every client for whom we provide legal assistance, whether it be with Tools, Transactions, or full Representation, will experience similar outcomes that are measurable. All such clients should gain knowledge of the legal system and of their own rights and responsibilities and what they can or should do, if anything, about the presenting problem. Most such clients should also feel empowered by this knowledge and information so that they may make informed decisions and be able to act to obtain a resolution, whether that decision is to pursue the tools that we provided or to work with us if an advocate is assigned. In addition to these initial and intermediate outcomes, we also expect that those receiving full representation will be impacted in a measurable way concerning the long term goals of their contact with us.

Having determined which outcomes to measure and how to categorize them, the process then became one of creating the measurement devices. As discussed above, outcome measurement in the United Way context is about the change that the program has caused in the recipients of services. Because our expected outcomes all involve how the client feels about their problem and the legal system (the Indicators of change), of necessity our measurement devices had to be questions for the client to answer. For our system, we crafted four questionnaires that were designed to measure the indicators that

change had occurred due to the client's interface with our program. Questionnaires were constructed both on paper and electronically, and testing of our system was done toward the end of the year using both volunteers and staff.

We also experimented concerning both when to measure the outcomes and how. Because LASO covers a large geographical area and has made a commitment to telephone intake, we determined to measure outcomes using telephone surveys. We first experimented with volunteers surveying the client while still on the line with us during the initial contact, and we also tested using staff and volunteers later, such as at night. These beginning tests then led us to make other decisions concerning how quickly to inquire of the clients so as to measure away from the influencing factors of the immediacy of the contact or the on-going nature of the representation. We ultimately determined to measure outcomes only after cases were closed, and that the timing of the measurement would be based on the level of service provided and the nature of the outcomes that we were trying to measure at the time. Our current plan is to measure only the initial outcomes that come from providing Tools within a week after case closure, and to measure all other outcomes for all levels of service within 45 days after the cases are closed. Our consultant has also helped us determine how large the sample size has to be to be statistically reliable for each of the levels of service in each LASO office based on typical case closures during the year. Limited testing of the basic system was done by the end of the year and feedback was immediate, telling us much we both wanted to know and did not want to know concerning our clients' perceptions of how well we had done.

LASO has now received funding from another United Way, the United Way of Central Oklahoma, to carry our outcome measurement project forward into a second year. Our working group has come back together and has had a couple of meetings so far already this year, resulting in more changes and reworking of our instrument (as has been the case almost every other time we have met in the past). For 2004, we are going to continue to test, track, and collect data on our model, analyze the findings, and move the project out of just our Hotline and urban areas for use in our offices statewide. We are planning on dealing with what we believe to be the effects of other influencing factors by placing filters in the system so that we can track differently the response of those clients who were "fully served" from their viewpoint (e.g. wanted a lawyer and were assigned one) as compared to those who were only "partially served" (e.g. wanted a lawyer but were only given advice or a pro se packet). We also will most likely install a filter to differentiate between the responses from those that achieved the desired goals of our agreed assistance versus those that got a good try but were unsuccessful.

To Infinity ... and Beyond

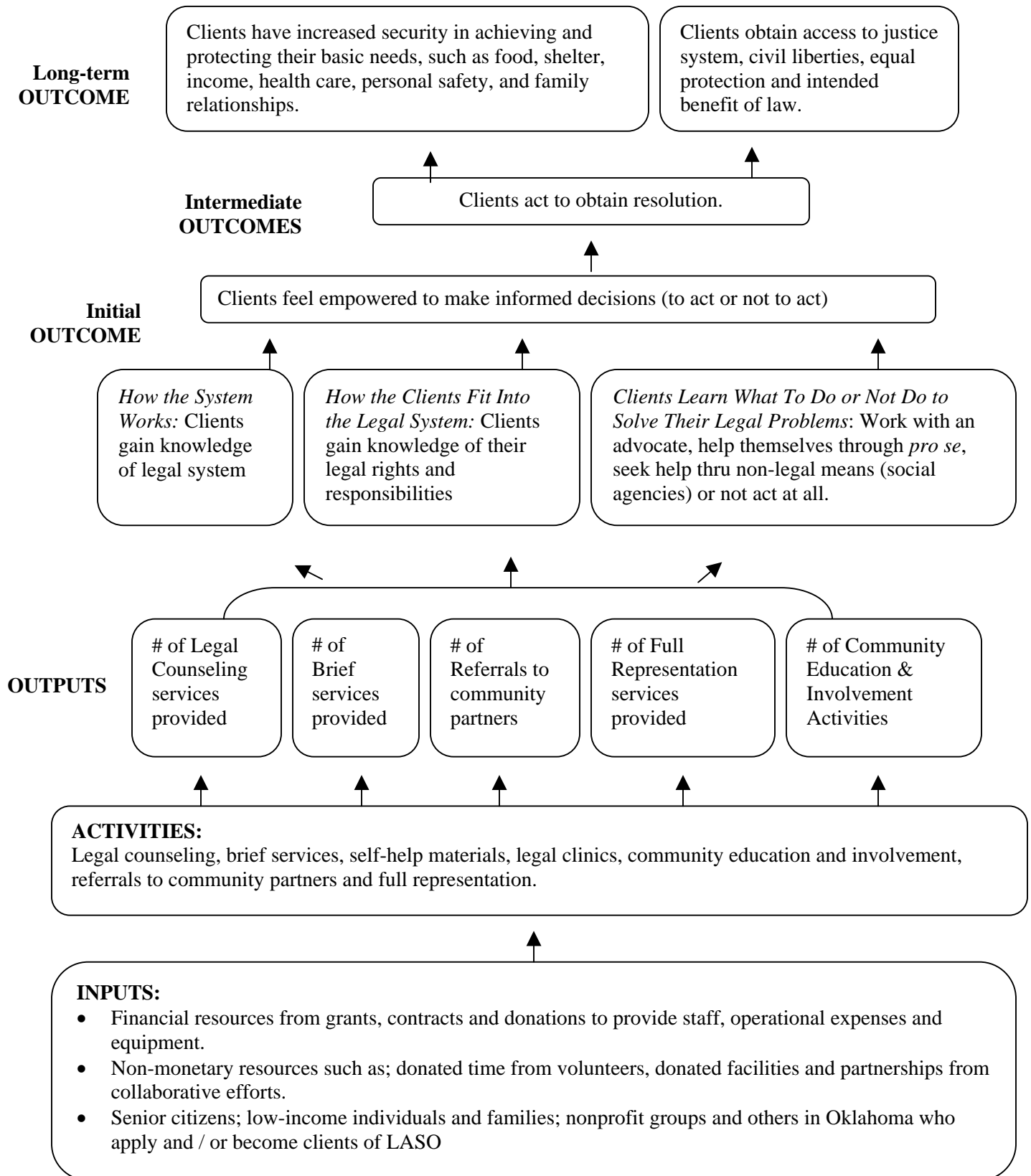
Regardless of how times we work and rework, test and retest, and analyze our results from the process each time, I think that all in our working group feel confident that our outcome measurement system has given us a powerful new tool. As promised by the United Way, we will be able to use the information that it generates. Internally, the feedback it gives will help us improve our programs, identify potential training needs,

and inform both our staff and our board; externally, it will help us retain and increase funding and promote the work of our program to our partners, the public, and our clients.

Establishing an outcome measurement system for LASO and its clients enabled us to look at the totality of our work and document its value. For years, we focused on being good litigators and giving our clients the good valiant fight, and we were largely successful with the resources that we had, at least from the lawyer's perspective. It was not hard for us to analyze the degree of success that we had accomplished for those to whom we provided full representation; we won or lost this issue or that, we settled or negotiated the best result the client could have hoped for, and so forth. Documenting the impact of our advocacy work was, however, only the tip of the pyramid. With the advent of the sea change in Congress in 1995, we committed to expanding access to the full range of services while at the same time we tightened our belts. This should have been the impetus for us to look additionally at the 85% of the work we did that was not representation. Those thousands of people each year for whom we could not put on our armor and march off to battle still got something that hopefully made them feel better about their circumstances or empowered them to take some steps toward resolution; until now we could not document the difference that we made for those whose lives we only briefly touched. Although we will continue to massage and rework our outcome measurement system over the next year and beyond, we know that regardless of its final format it will give us important information about ourselves, our work, and the difference that we make for our clients each day.

And to return to the assigned topic, our year-long outcome measurement project gave us something else – it helped us to continue the process of merging our program. Because outcome measurement was something new, something that neither program had any invested “turf” on, it allowed us to move away from the guess work about which core values should be adopted and whether LSC liked this or did not like that about our former programs. Our outcome measurement project enabled staff from all over the state to work on something that was purely new and unique to our new program. As Jon Asher has reassured us in Oklahoma based upon his Colorado experience, merger does not happen overnight despite what the paperwork says; we can expect that the process of our merger may continue on for years. Undertaking this project and starting to capture the differences that we are making for what are now our statewide clients has helped us to move the merger along.

LEGAL AID SERVICES OF OKLAHOMA
Outcome Measurement Logic Model



LEGAL AID SERVICES OF OKLAHOMA OUTCOME MEASUREMENT FRAMEWORK		
INITIAL Outcomes	Indicator	Questions
<i>How the System Works:</i> Clients gain knowledge of legal system	# & % of clients who understand the legal system #?& % of clients who understand whether or not their problem can be solved by legal system	As a result of services received from Legal Aid do you understand the legal system better? As a result of services received from Legal Aid do you understand whether or not your problem can be solved by the legal system?
<i>How the Clients Fit Into the Legal System:</i> Clients gain knowledge of their legal rights and responsibilities	# & % of clients who understand rights and responsibilities of client and adverse party	As a result of services received from Legal Aid do you understand your rights? As a result of services received from Legal Aid do you understand your responsibilities, or what you're supposed to do?
<i>Clients Learn What To Do or Not Do to Solve Their Legal Problems:</i> Work with an advocate, help themselves through <i>pro se</i> , seek help thru non-legal means (social agencies) or not act at all.	# & % of clients who understand options and merits of those options	As a result of services received from Legal Aid do you understand your options? As a result of services received from Legal Aid do you understand the pro's and con's of those options?

INTERMEDIATE Outcomes	Indicator	Questions
Clients feel empowered to make an informed decision (to act or not to act)	# & % of clients with increased confidence, hope, self-determination	Are you feeling better about the reason for your contact with Legal Aid? Are you more confident that you will be able to handle problems like this in the future Did the help you received from Legal Aid reduce your worry and stress?
Clients act to obtain legal resolution	# & % of clients who acted or did not act consistent with legal options	Did Legal Aid help you to solve your problem? Did Legal Aid help you keep the problem from getting worse?

LONG-TERM Outcomes	Indicator	Questions
Clients have increased security in achieving and protecting their basic needs, such as food, shelter, income, health care, personal safety, and family relationships.	# & % of clients who feel they have increased stability	As a result of the help from Legal Aid, are you (and/or your family) better off today?
Clients obtain access to justice system, civil liberties, equal protection and intended benefit of law.	# & % of clients who feel they obtained access to justice system, civil liberties, equal protection and intended benefit of law.	<p>Do you think your side of the legal problem was heard?</p> <p>Do you think that receiving help from Legal Aid made a difference in whether or not you had access to the legal system?</p>

Legal Aid Services of Oklahoma Outcomes Survey – TOOLS: INITIAL OUTCOMES	
<p>Service Provided</p> <p><input type="checkbox"/> Tools</p> <p><input type="checkbox"/> Transactions</p> <p><input type="checkbox"/> Representation</p> <p>Level of Service</p> <p><input type="checkbox"/> Fully Served</p> <p><input type="checkbox"/> Partially Served</p> <p>Problem Code: _____</p> <p>Case Closing Code: _____</p> <p>Advocate Code: _____</p>	<p>Case Number: _____</p> <p>OM Study # _____</p> <p>Phone Number(s) _____</p> <p>_____</p> <p>Call Instructions:</p> <p> </p>
<p>Interviewer: _____</p> <p>Survey Date: _____</p> <p>Comments:</p> <p> </p>	<p><input type="checkbox"/> Interviewed client</p> <p><input type="checkbox"/> Refused</p> <p><input type="checkbox"/> Client not in; phone answered by another</p> <p><input type="checkbox"/> Busy</p> <p><input type="checkbox"/> No answer</p> <p><input type="checkbox"/> Machine answered</p> <p><input type="checkbox"/> Disconnected</p> <p><input type="checkbox"/> Other _____</p>

Hi, my name is _____ and I'm a volunteer calling on behalf of Legal Aid Services of Oklahoma. Could I please speak with _____? We are helping Legal Aid find out what people think of their services. They indicated you talked to them about a _____ matter. Would you be willing to answer a few questions about that?

☐ Yes

☐ No → **Thanks anyway. (END PHONE CALL & COMPLETE FORM)**



Great, Thank you. For each of the following questions, please respond by answering Yes, No, Somewhat, Not sure or Not Applicable.

1. As a result of services received from Legal Aid do you understand the legal system better? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not
Applicable

2. As a result of services received from Legal Aid do you understand whether or not your problem can be solved by the legal system? (Interviewer: circle the response)

Yes No Somewhat Not Sure Not
Applicable

3. As a result of services received from Legal Aid do you understand your rights?

(Interviewer: circle the response)

Yes No Somewhat Not Sure Not
Applicable

4. As a result of services received from Legal Aid do you understand your responsibilities, or what you're supposed to do? *(Interviewer: circle the response)*

Yes No Somewhat Not Sure Not
Applicable

5. As a result of services received from Legal Aid do you understand your options?

(Interviewer: circle the response)

*If yes, ask
Q6, all other
responses,
skip Q6 and
go to Q7*

Yes
ble
↓

No Somewhat Not Sure Not

6. As a result of services received from Legal Aid do you understand the pro's and con's of those options?

(Interviewer: circle the response)

Yes No Somewhat Not Sure Not
Applicable

7. Would you say the staff has been:

*If answer is
"courteous"
skip to Q9, all
other
responses,
ask Q8*

- ☐ Courteous (skip to Q9)
- ☐ Somewhat courteous
- ☐ Not courteous
- ☐ Other (write explanation)

8. How could the staff have been more courteous?
(Write response)

9. How helpful overall has Legal Aid been to you?

- ☐ Very helpful
- ☐ Somewhat helpful
- ☐ Not very or not at all helpful
- ☐ Other (write response)

10. May I ask you to explain why or how the staff could have been more helpful?

- ☐ Yes (write response)
- ☐ No

11. If there was one thing Legal Aid could do better, what would it be?

12. Do you have any other comments?

Thank you for your time.